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Andrew Altfest, founder and CEO of FP Alpha, speaks during the Technology Tools for Today (T3) Conference on March 5 in Dallas.

Rob Burgess

The T3 announcements that wealth managers should know
By Rob Burgess
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The cliché "drinking from a firehose" seems to have been crafted with an event like the 2025 Technology Tools for Today (T3) Conference in Dallas in mind.

Attendees of the four-day gathering were treated to a torrent of discussions, presentations and panels on every aspect of the wealth management technology landscape.

But among all these big ideas were several solid product launches, collaborations

and expansions of services timed to coincide with the event.

While this is far from a complete list of all the announcements made by firms at the conference, here is a roundup of several of the most significant ones that advisors should pay attention to:

Libretto launches one-click personalized client letters
Financial planning and investment platform Libretto launched its personalized white-label client letters.

Based on templates and powered by generative AI, letter formats include prospect proposals, post-meeting briefs, onboarding documents and more.

In the 2025 T3/Inside Information Software Survey, Libretto scored 9.08 out of 10 in average user ratings. This earned it a "Mighty Mites" designation, which is awarded to solutions that were not market share leaders but had user ratings over 8. Joel Bruckenstein, T3 president, called Libretto's performance in the survey "extraordinary."

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Using IRS data, TaxStatus Financial Baseline debuts
IRS account monitoring platform TaxStatus launched TaxStatus Financial Baseline, which pulls data directly from the IRS instead of tax returns uploaded by the advisor.

"Instead of it taking days, weeks, months, years to get that information, you could get it in minutes," said Kevin Knull, CEO of TaxStatus, during a session at T3.

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Betterment Advisor Solutions introduces Solo 401(k)s
Custodian Betterment Advisor Solutions introduced its all-digital solo 401(k) for independent advisors and their self-employed clients.

During an interview with Financial Planning at T3, Thomas Moore, head of Betterment Advisor Solutions, said the firm had been hearing for years demand for the product from advisors and clients.

"A lot of people talk about having to send mail checks for individual contributions," he said. "So being able to innovate on what is out there, deliver a fully digital solo 401(k) product, is exciting."

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FP Alpha introduces NextGen Tax Insights
AI-powered tax, estate and insurance planning platform FP Alpha introduced

NextGen Tax Insights, which features customized strategies for tax savings.

"You take your clients' tax return, identify the year and the client's filing status and then drag, drop and upload the return," said Andrew Altfest, founder and CEO of FP Alpha, during a session at T3. "The return is read extremely quickly. Then you get detailed information about the client's tax situation and insights."

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Zeplyn expands practice management capabilities
AI assistant Zeplyn announced an expansion of its practice management capabilities, including an advisor hub, automatic agendas, comprehensive client recaps, pre-meeting client communications, compliance checklists and more.

"If compliance is going to mandate you to retain most of the client communication, why not use AI to leverage this data and convert it into valuable and actionable insights that can help you drive growth at your business?" said Era Jain, co-founder and CEO of Zeplyn, during a session at T3.

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BetaNXT rolls out BetaNXT CastX
Wealth management infrastructure software BetaNXT introduced BetaNXT CastX, which automates corporate actions from announcement data sourcing to tax reporting.

"If you automate, you're de-risking your business," said Chris Nobles, division executive for Mediant, a BetaNXT business, during a session at T3. "You're taking away the opportunity for mistakes and human error. You're also gaining time back. There are many ways to grow a business. One of them is to spend less time servicing customers, but the challenge is to do it in a way that does not take away from your service. And that's where automation comes in."

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Syntax Data, TradePMR collaborate to increase index and portfolio development capabilities
Direct indexing platform Syntax Data and brokerage and custodian services provider TradePMR announced a collaboration that aims to increase index and portfolio development capabilities.

The Syntax Direct custom index creation platform will now be available to TradePMR users.

"The fastest way to scale financial technological innovation is by scaling third-party integrations," said Patrick Shaddow, CEO of Syntax Data, during a session at T3. "Those companies that do not leverage third-party expert integrations are at a competitive disadvantage. Third-party integrations are developed by experts

in their respective fields."

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